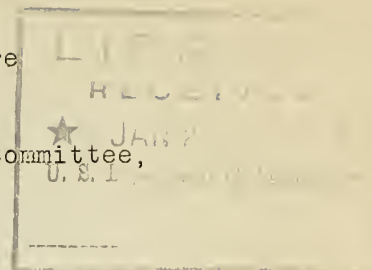


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United States Department of Agriculture
Bureau of Home Economics

In cooperation with the National Resources Committee,
Works Progress Administration,
and Department of Labor



FAMILY EXPENDITURE STUDY

INSTRUCTIONS ON PERSONNEL AND FUNCTIONS
for Local Supervisors of Field Work

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This manual discusses the duties, selection, and training of personnel in local offices. A supplement will be issued on office management and field organization.

I INTRODUCTION

This manual is designed to supply Supervisors in the Family Living Survey with detailed instructions for the various activities and responsibilities delegated to them. Since the manual provides information for the performance of all duties, Supervisors are urged to become thoroughly familiar with its contents. It is important that all details of the survey be uniform from region to region. Such uniformity greatly facilitates the administrative program and is essential to the collection of comparable data.

There will be from time to time supplementary bulletins from the Central Office in Washington which should be incorporated in instructions and procedures when found necessary.

Local Supervisors are responsible to the Regional Supervisor for the technical aspects of the survey, and for administrative matters. All supervisors must thoroughly understand the schedules and the instructions for their use. They must have a clear picture of the aims of the survey and interpret the schedule to others employed on the survey with those aims in mind. They must also understand all regulations, and see that reports and routine duties are correctly carried out.

II GENERAL PLAN OF THE SURVEY

1. PURPOSE. This survey of family living is concerned with the kinds and quantities of goods and services consumed by different types of American families.

Many uses will be made of the information resulting from the collection, analysis and evaluation of these data. The information will be used (1) in appraising the adequacy of the level of living maintained by different population groups; (2) in planning for improvement in living conditions; (3) in preparing budgets to help homemakers administer family finances more satisfactorily; (4) in formulating plans for commodity production and distribution; and (5) for the construction of indexes which serve to measure changes in the cost of living from time to time, and from place to place.

2. SCOPE. This survey of family living will be carried out in 23 states, among families living on farms, in villages and in small cities. This project, directed by the Bureau of Home Economics, is coordinated with a similar investigation administered by the United States Bureau of Labor Statistics among families living in large cities and industrial towns.

For purposes of collecting and editing schedules the States included in the Bureau of Home Economics study are grouped into six regions with 57 headquarters, as shown below. Regional headquarters are underlined.

Region	State	Headquarters	Region	State	Headquarters
New England	Vermont	(Burlington (Newport)		No. Dakota	(Fargo (Jamestown)
	Mass.	(<u>Greenfield</u> (Fall River)		Iowa	(<u>Ames</u> (Boone (Grennell (Marshalltown)
	R. I.	Westerly		Missouri	Moberly
Middle Atlantic and East North Central	New Jersey	Salem	West North Central	Kansas	(Ness City (Newton)
	Pa.	(Lancaster (York)		Nebraska	(Beatrice (David City (Lincoln)
	Ohio	(Bucyrus (<u>Mansfield</u> (Mt. Vernon (New Philadelphia)			
	Michigan	Monroe		Colorado	(Grand Junction (Steamboat Springs)
	Wisconsin	(Beaver Dam (Madison)		Wyoming	(Casper (<u>Laramie</u> (Rock Springs)
South Atlantic and East South Central	N. Carolina	(Murphy (?) (Henderson (Oxford)	Mountain	Utah	Logan
	S. Carolina	(Camden (Columbia (Orangeburg (Sumter)		Washington	(Bellingham (Everett (Wenatchee)
	Georgia	(<u>Athens</u> (Monroe (Washington (Griffin)		Oregon	(Astoria (Bend (Eugene (McMinnville (<u>Salem</u>
	Miss.	(Clarksdale (Greenville (Indianola)	Pacific	California	(Stockton (Riverside)

More than 150,000 families in certain localities selected at random from families living on farms, in villages, and in small cities, will be interviewed for the information requested on the "family schedule". This information relates to family composition, occupation, income, race, and housing. From this large number about 21,000 families will be selected according to a prearranged plan, to represent different occupational, income, racial groups, and specific family types. This smaller group will be requested to give the information needed to fill out the "expenditure schedule". The expenditure schedule deals with details on housing facilities, expenditures for household operation, food, clothing, furnishings, medical care, recreation, etc. From part of the 21,000 families supplementary information will be requested on the quantities of different articles of food and clothing purchased, and on medical care.

3. DURATION. The Survey of Family Living will require from 3 to 5 months for field work, the collecting and editing of schedules and a somewhat longer time for coding, tabulation, and analysis of the results.

The field work for the survey must be completed not later than June 30, 1936. In many places it will be completed before that time. Time for visits to complete schedules rejected by editors as well as time for visiting all families missed on first or second calls should be included in the time schedule planned. Often these two important parts of the field work are not included in the plan and incomplete returns result. Accurate and complete schedules are always to be stressed rather than speed in covering the territory.

III DUTIES AND QUALIFICATIONS OF PERSONNEL

1. Local Supervisor

a. Administrative Duties

- (1) Help establish and maintain cooperative relations with officials of the State and District Works Progress Administration, the United States Employment Service, and the Treasury Accounts and Disbursing offices.
- (2) Assume responsibility of creating good will for the project in the locality, making contacts with and obtaining the cooperation of local agencies, such as newspapers, chambers of commerce, women's clubs, agents of the farm bureau and home bureau, or other members of the extension service.
- (3) Establish office, procure equipment, plan and supervise office routine.
- (4) Employ relief personnel and nominate non-relief workers, subject to the review of the Regional Supervisor.

- (5) Authorize expenditures, and certify payrolls.
- (6) Maintain such records and make such reports as are required.
- (7) Supervise work of Administrative Assistant in charge of payrolls and W.P.A. reports.
- (8) Take charge personally of discipline of relief workers and make recommendations to the Regional Supervisor when disciplinary measures are necessary in regard to non-relief persons.
- (9) Interview all who make complaints in the local office, whether relief or non-relief workers, or individuals who have been interviewed or whose cooperation the field agents have been unable to secure.

b. Technical Duties

- (1) Understand thoroughly the purpose, scope, and method of the survey.
- (2) Be responsible for collection and editing of schedules for maintaining the flow of schedules, according to rates suggested by the Regional Supervisor, and for otherwise guiding the local survey to successful completion within the time, personnel, and budget limits established by the Central Office in Washington.
- (3) Assume responsibility for checking the accuracy and completeness of field work by making re-visits to families. (In localities where a large staff of field agents is employed, the Local Supervisor may delegate part of this check interviewing to the Assistant Supervisors, but he, himself, should do some checking.)
- (4) In localities where fewer than 250 schedules are collected (and where there is no assistant supervisor in charge of field work), supervise the field work. (See duties outlined for Assistant Supervisor in Charge of Field Work.)

c. Qualifications

- (1) Executive ability
- (2) Force, tact, and patience, and the ability to follow through many detailed operations.

- (3) Thorough acquaintance with the city or community in which appointed and ability to make satisfactory contacts with local cooperating agencies.
- (4) Presence and determination in approaching any official or group whose interest and cooperation are needed.
- (5) College training, with work in economics and statistics. Understanding of and field experience in statistical research.

2. Assistant Supervisor in charge (a) of Training Field Agents and (b) of Editing

In most districts the Assistant Supervisor can complete or almost complete the work of training field agents before editing begins. For this reason, and because the duties are closely connected, one Assistant Supervisor is made responsible for the two activities. In very large enumeration areas and where total field personnel cannot be assigned within a relatively short period of time, it may be necessary to designate another person to carry on training activities after the editing of schedules has been started.

a. Duties

- (1) Train field agents and squad leaders in filling schedules. Give workers background in aims and purposes of the study, stressing the scientific and professional aspects of the study and the importance of a workmanlike attitude toward employment.
- (2) Certify field agents to the Supervisor in Charge of Field Work as ready for work, after satisfactory examination.
- (3) Train editors in editing instructions and methods
- (4) Supervise editing for complete and consistent entries.
- (5) Keep a written record of all decisions on questionable points, and clear with Regional Editor within a day.

b. Qualifications

- (1) Experience in teaching, and ability to adapt teaching methods to educational level of field agents and editors.
- (2) Experience in and understanding of statistical procedure; an appreciation of statistically sound data.
- (3) Patience, tact, and persistence in supervising and improving the technique of field agents and editors.
- (4) College training or its equivalent.

3. Assistant Supervisor in Charge of Field Work.

Field work includes the collection of sampling and expenditure schedules and the checking of certain commodity lists. The Assistant Supervisor in Charge of Field Work will be responsible for the collection of such schedules from families that are eligible as defined in sampling instructions. The staff will include squad leaders and field agents.

a. Duties:

- (1) Instruct squad leaders and field agents in manner of approach to the families.
- (2) Determine families to be approached, control placement, assign work, and supervise schedule collection.
- (3) Interview each squad leader daily for a report of his work and that of the field agents under his direction.
- (4) Provide for transportation of field agents to the farms and villages in which they work.
- (5) Check on the progress of work and coverage of areas.
- (6) Assist Local Supervisor in check interviewing.

b. Qualifications

- (1) Thorough understanding of the schedule and instructions, and sampling procedures.
- (2) Familiarity with the locality and its transportation facilities.
- (3) Experience in teaching and supervising adults.
- (4) Patience, tact, and persistence in checking the work of the field agents, and ability to prevent lax, inadequate, and inaccurate reporting.
- (5) College training or its equivalent, with work in economics and statistics.

4. Administrative Assistant

a. Duties

- (1) Keep record of hours of work of all personnel of local office.
- (2) Prepare payrolls.
- (3) Prepare all reports for W. P. A.
- (4) Plan and supervise office routine, directing work of stenographers, bookkeepers, and janitorial staff.

b. Qualifications

It is anticipated that this employee will be nominated by the division of finance and accounts of the state or district W. P. A. office and will be a worker whom that division has found satisfactory. If the district office is unable to release one of its employees from this division, the Federal Emergency Relief Administration division of accounts can recommend workers who proved satisfactory under the Federal Emergency Relief Administration program. In general, the person should have had accounting procedure, and in all cases, he should be satisfactory to the district director of finance and accounts.

5. Stenographer-Clerk

All except the smallest offices will need one person who can type, take dictation, and maintain or supervise the maintenance of local files.

Qualifications

- (1) Business college or its equivalent.
- (2) Experience in taking dictation, typing, office management and supervision, setting up and maintaining filing systems.
- (3) Pleasant personality.
- (4) Ability to organize and follow up many detailed operations.

6. Other Office Workers

It may be necessary to assign assistants to some workers whose duties and qualifications have been stated above. Such office workers should have the same qualifications as those whom they are assigned to help. Their duties also will be similar.

7. Field Agents

a. Duties

- (1) Obtain from families (chosen according to directions for sampling) the information needed to fill out the Family (or Sampling) Schedules.
(See Field Agent's directions for Family Schedules)
- (2) Obtain from families (chosen according to information given on the Family (or Sampling) Schedules,) information asked for on the Expenditure Schedule.
(See Field Agent's directions for Expenditure Schedules).
- (3) Request from families (selected according to directions furnished) information needed to check the commodity lists.
- (4) At daily meetings with squad leaders go over activities of the previous day including number of hours worked, number of schedules filled, and sign the day's report.
- (5) Review, complete, or correct schedules rejected by editors, as directed by editors and squad leader.

b. Qualifications

- (1) Pleasant personality and friendly attitude toward the work.
- (2) Mental alertness.
- (3) Maturity and poise.
- (4) Previous experience in field work in similar surveys if possible. Experience which involved friendly contacts with people are helpful. Applicants from the following fields should be given consideration:

Social and case workers	Public Health Nurses
Newspaper reporters	Settlement House Workers
Experienced salespeople	Personnel or Employment
Teachers	Office heads
	Mature college students

- (5) Legible handwriting

7a. Special Field Agents in Charge of Collecting Food Records

a. Duties

Obtain from families (chosen according to directions for sampling, and willing to cooperate) the information requested on the "Food Record Schedule". This consists of an inventory (by weight) of food at hand at the beginning and end of the week, and daily records of food brought into the house and of food not eaten by the household. Information on factors affecting dietary habits and needs is also obtained.

b. Qualifications - Same as for field agents with the following additions:

- (1) Greater than average skill in interviewing.
- (2) Scientific attitude and precision.
- (3) If possible, laboratory training in chemistry or physics; and special aptitude in mathematics.
- (4) College training in foods and nutrition.

7b. Squad Leaders

Some of the more able field agents should be selected to assist the supervisor in charge of field work. They will spend their time in the field, taking schedules except when performing the special duties assigned them.

a. Special duties

- (1) Make sure that each field agent knows the district she is to cover and keeps within her own district.
- (2) See each field agent once during the day and secure her record for the preceding day, showing hours worked, schedules filled, schedules rejected, and schedules corrected. Review record with agent.
- (3) Review with field agent the schedules rejected by the editors and decide on necessary action.

b. Qualifications same as for field agents with following additions:

- (1) Better than average understanding of the schedule and instructions, as determined by the preliminary test, and skill in completing schedules.
- (2) Experience in supervising adults.
- (3) College training valuable, but not essential.

8. Editors

Editors review all schedules filled by enumerators.

a. Duties

- (1) Examine schedules for completeness and accuracy.
- (2) Note on comment slips entries omitted, or entries which are not acceptable according to established standards.
- (3) Return rejected schedules for correction. When necessary, explain to squad leaders or field agents the reasons for rejection.
- (4) Read schedules returned to see that all corrections and additions have been made.

b. Qualifications

- (1) Thorough understanding of the schedule and instructions.
- (2) Understanding of statistical procedure and the importance of uniform data.
- (3) A sense of responsibility for schedules accepted as satisfactory.
- (4) Interest in details and a critical sense for details.
- (5) Speed and accuracy in routine operations.
- (6) Experience in other surveys, if possible. The following occupations may provide good sources for editors:

Teachers	Architects
Statisticians	Lawyers
Draftsmen	Accountants
Bookkeepers	Engineers

- (7) College training or its equivalent.
- (8) Legible handwriting.

9. Control Clerks

Large offices will find it necessary to employ one person. (from relief if possible), to be responsible for the control of schedules in the office and to maintain time and production records. It is possible that one or two assistants also may be assigned, whose work will be similar and perhaps under his direction.

a. Duties

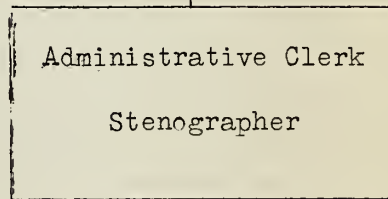
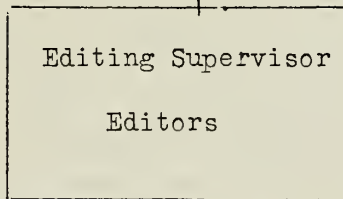
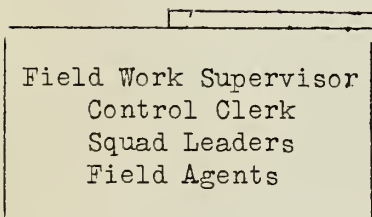
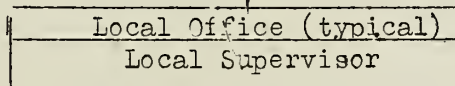
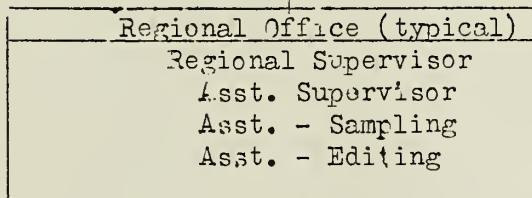
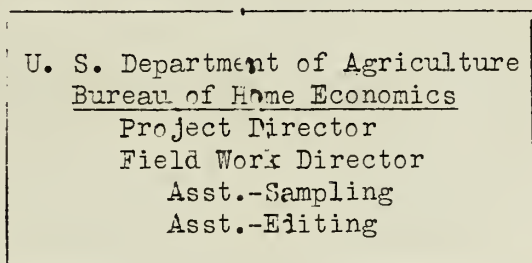
- (1) Maintain files of schedule control cards, personnel, time and production records.
- (2) Understand all procedures for personnel and schedule control.
- (3) Direct flow of schedules through the local office from enumerator through editing to the Central Office.
- (4) Perform other delegated office duties at the direction and under the supervision of the Local Supervisor.

b. Qualifications

- (1) Experience in accounting methods and procedures.
- (2) Ability to organize and routinize detailed procedures and supervise their operation.
- (3) Ability to operate a typewriter.

10. Office Organization

The line of authority and responsibility among the several employees is indicated in the following chart:



IV SELECTION AND TRAINING OF LOCAL WORKERS

1. Selection

All local workers should be chosen in accordance with qualifications and duties outlined earlier. The numbers of non-relief and relief workers to be employed in local offices is given on sheets showing "Personnel, Wage Rate and Supply Estimates", one made out by the Washington office for each headquarter's office. These estimates are not inflexible, and some modifications may need to be made after the work is well under way. The estimates must not be exceeded without the consent of the Regional Supervisor. Administrative procedure for employment is discussed in instructions on "Establishment and administration of local offices".

Interview each applicant from relief rolls to determine physical qualities, mental attitude and alertness of the applicant, and legible handwriting. Interview a considerable number before choosing definitely the ones to be examined further.

Give a test to determine ability to understand and follow instructions. Some suggestions for tests follow:

A group of not more than twenty applicants is assembled, and the Local Supervisor or the Assistant Supervisor in charge of Training explains the purpose and scope of the survey, the methods to be used, and other general and local information about the study.

Members of the group are then provided with a copy of the schedule correctly filled out from a narrative which is also supplied, together with instructions for filling the schedule. They are to take the material home for study. At a specified time the following day the group re-assembles. Each one is provided with a second narrative and a blank schedule to be completed from the information contained in the narrative. All instructions previously provided may be used in completing the schedule.

These schedules are reviewed and on the basis of completeness, accuracy, general intelligence of approach to the problem and legibility, enumerators, squad leaders, editors, and re-editors are selected. It may be possible to make an informal arrangement with the Works Progress Administration to send persons with necessary qualifications to be interviewed and tested before assignment is made. This will avoid a good deal of office work in making out papers for persons not suited to the work. However, if the arrangement cannot be made, the test will be given before the applicants are accepted for employment.

2. Training

a. Non-Relief - Local Supervisors and Assistant Supervisors will receive training on methods of the survey and suggestions for supervision from the Regional Supervisors prior to the establishment of the local office. After this training, it then becomes the duty of the Local Supervisor to train and supervise such assistants as are provided. This training will consist largely of the assignment of duties and the exercise of supervision.

Duties of each position are listed briefly in Section III.

b. Relief - Specific training is provided for enumerators, squad leaders, editors and re-editors on completing schedules. All will be given the same basic training. When this is completed satisfactorily, training in special duties will be provided.

(1) Basic training on Completing Schedules: In general the best possible method of training is through actual experience in completing schedules under the supervision of an instructor.

After the first test schedule has been completed and reviewed, the instructor will hold a conference with the group, at which time the entries on the schedule will be discussed and correct procedure explained. The instructor will then go over the schedule and instructions item by item, making necessary explanations, answering questions raised by members of the group, and making sure that all understand each entry.

Copies of another family narrative will then be provided and another schedule filled out. Each schedule should be reviewed individually with the person who made it, and all errors explained and entries carefully corrected. The Assistant Supervisor in charge of Training may need to call on other members of the staff for assistance at this point if the group is large. If individual interviews are impossible, groups of three or four may be taken together. The instructor should make sure that each member of the group understands all corrections and the reasons for them.

If possible, stage a demonstration interview, using staff members as field agent and informant. It should be explained to the group that the staged interview is an illustration of methods, not a model to be followed in detail. The interview may be divided into two sections for discussion, approach and interviewing technique. Instructions included in the Instructions for Field Agents will be used in staging the interview.

After the second family narrative has been used for a schedule, and after the demonstration, a third and more difficult narrative is provided. On the basis of success in filling this schedule the field agent may be certified for field work, or more training may be recommended.

As small groups of field agents and others complete the schedule with the required degree of accuracy, the Local Supervisor will bring them together and explain the standards set for quality and quantity of production, the channels through which the schedules move, and other details of the study which are not clear. They are then assigned to field duty, and provided by the Supervisor in charge of Field Work with all necessary equipment. Squad leaders and editors will be required to complete at least two schedules in the field before other duties are assigned.

(2) Training for Squad Leaders. Specific instructions on forms required of squad leaders should be given. These include Enumerator's Weekly Production Record, Squad Leader's Weekly Summary of Production and Daily Record of Uncompleted Schedules.

Squad leaders should be instructed that in interviewing enumerators on schedules rejected by the editors, all criticisms must be kept absolutely impersonal and suggestions should be based on the instructions prepared for the enumerators.

(3) Training for Editors. Special instructions have been prepared for editors. After they have successfully completed at least two interviews, and have been assigned to editing duties, editing instructions will be distributed and time allowed for reading and studying them. After the instructions have been carefully read, the Supervisor in charge of Training and Editing will conduct an oral quiz, bringing up points which may cause difficulty, answering questions concerning editing, stressing always the importance of an accurate check on the entries made by the enumerators.

Schedules which were filled by editors and squad leaders in the field should next be distributed, comment slips provided and the editors instructed in making entries on the slips. When this is done, the supervisor should review the slips individually, pointing out errors and omissions and making such explanations as are necessary.

It should be constantly stressed in training and supervising editors that they are to make no changes or corrections on the schedule. All entries are made by the enumerators or squad leaders. The editor's function does not include completing or correcting schedules.

